

**OFFIX™**

**The Personal Office System**

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**Preface**

We've prepared this booklet to answer these questions:

- What is **OFFIX**?
- What does it do?
- How do I learn to use it?

Since **OFFIX** does not have a printed user's manual, we recommend that you read this booklet before you start using **OFFIX** (even though we understand the temptation of using **OFFIX** right away).

**Introduction**

**OFFIX** is an integrated software package that combines

- Filing
- Word Processing
- Forms Design
- Report Generation

**OFFIX** was designed specifically to allow a novice personal computer user to be productive within a few minutes. On the other hand, **OFFIX** still has enough power to satisfy the needs of most advanced personal computer users. One way **OFFIX** accomplishes this is by using familiar office terminology instead of obscure computer jargon.

**OFFIX** does not have a printed user's manual. You learn **OFFIX** by using the wide range of learning tools that are part of the program itself. These tools

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consist of menus, help screens, tutorials, error messages, and on-line documentation. You get all the assistance you need when you need it.

OFFIX uses an office environment as a model because it allows you to do many things right from the start, such as opening drawers and taking out folders. However, OFFIX is better than a real office because OFFIX can automatically produce reports, form letters, labels, and other office documents that are difficult and tedious to produce in a non-automated office.

The rest of this booklet explains how OFFIX works and how it can help you use your computer in a more effective and pleasant way.

### A few words about Integrated Software Packages

An integrated software package combines in a single computer program many functions that can usually be found only in separate programs.

There are several advantages in using integrated packages:

- Integrated packages are easier to master. You need to know and remember a single set of commands for all tasks.
- Integrated packages allow sharing of results between tasks. You can use the results and data generated by one part of the system in another part without doing any conversion or adaptation.
- Integrated packages make changing tasks much easier. With non-integrated systems, for example, switching from word processing to filing requires that you physically exit one program and begin another. This often involves changing diskettes. With an integrated system you do not have to change programs every time you switch tasks -- they are all accessible to you from within the system.

A good integrated software system is not made by simply taking a group of existing programs and somehow combining them into one. Every element of the integrated system should be designed with the other elements in mind. All pieces need to be connected to each other to form a solid foundation for all functions. This is how OFFIX was built.

### How OFFIX Works

OFFIX was designed to mirror the office environment that most people are familiar with. The OFFIX file cabinets are used to store folders that contain information. The information can consist of filled-in forms and documents. All information in OFFIX is stored in folders. In the most general sense, OFFIX is a system that allows you to do the following:

- Make folders that can be stored and retrieved from file cabinet drawers.
- Create documents and forms that can be taken out of or put inside folders.
- Produce reports and form letters based on the contents of a folder.



As you can see, most of your work with **OFFIX** is done with folders and with the contents of folders.

### **Finding your way through OFFIX: Cabinets, Drawers and Folders**

When you first start **OFFIX**, you see on the screen the **OFFIX** Cabinet Room. The room contains two file cabinets with three drawers each. The file cabinets are used for the usual purpose: to store information.

Most of the powerful features of **OFFIX** are performed inside an open folder. You can use the word processor, design forms, produce form letters and generate reports only when a folder is open. These features will be described later.

To open a folder and see what is inside, you need to open the drawer, take the folder out of the drawer, and open the folder. (These are the same actions that you would perform in a real office.)

When you open a drawer, you see a picture of an open file cabinet drawer with 8 visible folders. Just as with standard file cabinets, you find the folder you want to take out by searching through the folder tabs, which are always arranged in alphabetical order.

In every open drawer with folders (drawers can be empty), there is always one folder that is the selected folder. The selected folder appears on the screen in reverse video (white background). The selected folder can be taken out of the drawer. You see on the screen how the folder moves from the drawer to a location on the screen reserved for outside folders.

Folders can be taken out of different drawers. You can move a folder from one drawer to another by taking it out, closing the drawer, selecting and opening a new drawer, and putting the folder inside. Just as in a standard paper office, you may sometimes misplace a folder by putting it in the wrong drawer! (**OFFIX** will warn you when you are moving folders to different drawers.)

You can take out and open a maximum of two folders simultaneously, although this is not a very common operation. You do this when you want to copy things from one folder to another.

When you want to make a new folder, **OFFIX** prompts you for the label to put on the folder tab. Making an **OFFIX** folder is just like getting a paper folder from the stock room, putting a label on it, and saving it in a file cabinet. The new folder is initially empty.

You can store up to 100 different folders in each **OFFIX** cabinet drawer. The computer screen is not big enough to show you all the tabs at the same time, but you can view every folder tab by using the arrow keys to move them across the screen.

### **Inside a Folder: Forms and Documents**

You can open a folder after it has been taken out of a drawer. You then see on the screen a picture of a folder with the names of the things that are inside



the folder (except when the folder is empty). The names are organized in alphabetical order. These are names of documents or names of filled-in forms.

You can design your own **OFFIX** forms to look like the forms that are widely used in standard offices (e.g., employment applications, order forms, vouchers, etc.) To understand what the name of a filled-in form is, think of a typical personnel record form where the first entry is the name of the employee. Then the names you would see on the open folder screen would be the names of the employees.

You use the up and down arrow keys to select a document or form. The selected name is shown on the screen in reverse video. You can open the selected document or form to see it. If the selected name is the name of a document, you automatically go into the word processor and the first lines of the document are shown on the screen. If the name is a form, you automatically go into the form entry system and the form is displayed on the screen. You can see a maximum of 11 names on the screen at the same time. The arrow keys can be used to see more names.

Once a folder is open you can directly invoke the word processor, you can produce reports and form letters and you can fill forms. Every new document or filled-in form is stored in the open folder. Reports and form letters are generated by using the information stored in the open folder. **OFFIX** reports and form letters are explained later in this booklet.

### **The OFFIX Word Processor**

You use the **OFFIX** word processor to produce documents that are automatically filed in the currently open folder. **OFFIX** documents can be letters, business reports, envelopes, labels, and so on. The **OFFIX** word processor uses a "what-you-see-is-what-you-get" approach that allows you to see documents on the screen before you print them.

The **OFFIX** word processor has editing commands to delete characters, lines and blocks of lines. You can copy and transfer blocks of lines within the document. When you are editing a document, you can read and merge other documents from the same folder, from other folders, or even from outside the **OFFIX** file cabinets.

To set the layout of your document, **OFFIX** shows you a picture of a sheet of paper. Using this picture you can set the page length, width and margins. The page width is adjustable from 10 to 120 characters, with automatic word-wrap during text entry. If the page width is wider than 80 characters, the page moves sideways to the left as you type.

You also use this picture to tell **OFFIX** whether you want single, double or triple spaced lines. Finally, the picture is used to enter the document title, to control page numbering, and to turn on or off beginning-of-page printing pauses (for inserting sheets of paper in your printer). **OFFIX** can also enhance the appearance of documents with automatic underlining and boldening on any printer.

A folder may have an unlimited number of documents in it. Each document is a



separate computer text file whose title and page layout is stored in the folder.

### OFFIX Forms

Each folder can have one type of form. To design the blank form for a folder, you use the word processor to create a document that looks like a form. That is, it has labels for the various entries, and underscores for the blanks to be filled in. Here is an example of a typical form (this form will be used for other examples later):

#### CUSTOMER INFORMATION

Name \_\_\_\_\_ Date \_\_\_\_\_  
Company \_\_\_\_\_  
Street \_\_\_\_\_ City \_\_\_\_\_  
State \_\_\_\_\_ ZIP \_\_\_\_\_ Age \_\_\_\_\_ Annual Income \_\_\_\_\_  
Products owned \_\_\_\_\_ Purchased at \_\_\_\_\_

When you're ready, you tell **OFFIX** to make the document the blank form for the folder that is open. Once a form has been defined in a folder, you can take blank forms out of the folder to fill them and file them (in the same folder). With some minor restrictions, **OFFIX** allows you to re-design the form without losing any stored information.

**OFFIX** forms are unusual in that, when you fill a form entry, the number of characters you can put in the blank can be longer than the space that you allocated for the entry. Every entry is like a little window. When you reach the end of the entry, the contents of the window move to the left. You can move the cursor within the window with the left and right arrow keys. This feature allows you to include a lot of information in a form without wasting screen space.

Filled forms are filed in folders in alphabetical order according to the values of the first entry in the form. In the CUSTOMER INFORMATION form above, they would be filed by "Name". There cannot be two forms with identical names in the same folder.

### Finding Forms

To find a given filled-in form in an **OFFIX** folder, you can simply scan through an open folder until you find the form you want, or you can use the **OFFIX** Form Search feature. You use this feature to tell **OFFIX** which forms you want to search for. For example you might want to see the forms of all the customers that live in Montana, or the forms of all customers that are 30 years old. **OFFIX** finds these forms for you automatically.



The OFFIX Form Search feature is very powerful. You can define search criteria of the following types:

1. Exact Matches. You use an exact match when you want to find a specific form. For example, to find the form of the customer whose name Hillary Miller or to find the form of the customer who lives at 4457 Elm Avenue in Denver.
2. Partial Matches. You use partial matches to find groups of forms. For example, to find the forms of all customers whose last name begins with a "W" or the forms of all customers who purchased your products in 1983.
3. Numeric Comparison Matches. You use numeric comparison matches to find forms where numbers are used. For example, to find all customers who are older than 45 years or the forms of customers whose annual income is greater than \$30,000.00.
4. Numeric Range Matches. You also use numeric range matches to find forms where numbers are used. For example, to find all customers whose annual income is greater than \$25,000.00 but less than \$40,000.00
5. Negations. You can use negation to search for filled-in forms that do not match a given criteria, instead of looking for forms that do. For example, you may find the forms of all customers who did not purchase your products during the month of February, 1983.

You can define up to ten criteria to search for forms. For example, you can automatically find the forms for all customers whose last name is "Smith", that are between 25 and 45 years old, that live in California, and that earn more than \$33,000.00 per year.

After you define which forms you want to look at, OFFIX will find the forms that match the search criteria and display them on the screen, one at a time. You can modify the information on each form before you proceed to the next one.

### OFFIX Form Letters

An OFFIX form letter is a document that is printed many times, with slightly different information inserted at various places for each printing. OFFIX allows you to generate individualized letters that use information from each filled-in form that meets the criteria that you specify. You specify the forms used in the form letter in the same manner as you do when you use the Form Search Feature.

A form "letter" does not need to be a letter. Envelopes, labels, and any other repetitive documents containing information extracted out of a folder can also be produced using the form letter feature of OFFIX.

First, you must use the OFFIX word processor to write your letter (or whatever). Then you use the OFFIX form letter feature to tell OFFIX to whom you want to send the letter. A simple example can show how easy this is. The following letter could be sent to all customers that live in Texas (using the CUSTOMER INFORMATION form):

December 10, 1983

{Name}  
{Street}  
{City}, {State} {ZIP}

Dear Valued Customer:

Just a short note to thank you for your patronage during the past year. It has been a pleasure serving {Company} this year. Our business in the state of Texas has grown considerably with your collaboration.

Happy Holidays to you and to your family!

Joyously,

ABC Refuse Company

When **OFFIX** prints form letters, it replaces the labels inside the curly brackets by whatever is stored in the forms. You can use whatever labels you like in the blank forms you design yourself. Just use the same label (within curly brackets) in your form letter, and the substitutions will be made. Not only in the inside address, but anywhere at all!

### OFFIX Reports

An **OFFIX** report consists of data taken from several filled-in forms, printed in columns. For example:

<u>NAME</u>	<u>COMPANY</u>	<u>STATE</u>	<u>ANNUAL INCOME</u>
Adams, Melissa	Kregg Oil	TX	28,700.00
Mendelsson, Mork	Music Drawings	MA	19,100.00
Peoples, Ozzie	Aluminum Bats	NY	37,800.00
Smith-Jones, John	Mill Brothers	AZ	23,300.00
Williams, Lisa	Colorado Floors	CO	31,200.00
			<hr/>
			140,100.00

To request a report, **OFFIX** guides you through the steps required to specify which forms you want to include in the report, what titles you want for each column and how wide you want the columns to be.

The items of a report can be sorted by any column. In the previous example, they are in alphabetical order by name. You can produce the same report sorted by company name, by state, or by annual income. If you want, **OFFIX** can total the dollar values or integer values of any report column containing numbers.



## OFFIX Learning Tools

As you know by now, **OFFIX** does not have a printed user's manual. Everything you need to learn **OFFIX** is inside the **OFFIX** program, in plain and simple English. As you will see, there are no computer terms used anywhere in **OFFIX**. In fact, you need very little knowledge of computers to use **OFFIX**.

There are different levels of tools available: tutorials, menus, help screens, error messages, and a special **OFFIX** information folder. Most of these are displayed in pop-up windows. A pop-up window consists of information enclosed in a rectangle that is displayed on top of whatever is on the screen (without destroying the previous information). It's like putting a piece of paper temporarily on top of another one. This technique is very important, since it allows for more information to be displayed than what is normally possible.

**OFFIX** also uses other types of messages to tell you what it's doing (e.g., opening a folder).

### OFFIX Tutorials

The tutorials teach you the basic things to get started in each **OFFIX** function. You go through the tutorial any time you access an **OFFIX** feature you've never used before.

**OFFIX** tutorials can consist of one or more screens of information. For every multiple screen tutorial, you always have a choice of seeing the next screen or skipping the rest. The word processing tutorial uses a split-screen approach. You can practice on the bottom half of the screen while each lesson is displayed on the top half of the screen.

Tutorials are great when you first start using a new computer program, but they can be a nuisance later on. **OFFIX** gives you the best of both worlds by allowing you to selectively turn off tutorial sections. At the end of each tutorial section, **OFFIX** will ask you if you want to turn off that tutorial. You can always go back and turn on all tutorials if you want to see them again.

Some functions, such as producing reports and form letters, require several interactive steps. The tutorials for these cases guide you step by step through the complete process. Tutorials are complemented by help screens, which are available even when tutorials are turned off.

### OFFIX Menus

**OFFIX** menus are tables that concisely describe the most important choices you can exercise at any given time. They are memory joggers. Each entry in the menu tells you what keystrokes to use for each choice. Menus are of different sizes, depending on how many things can be done at the time.

**OFFIX** menus are available for use at any time. An **OFFIX** menu appears on the screen when you press the MENU key. If you already know what key to press, you do not need to use the MENU key. If you press a valid key with the menu on the screen, the menu is automatically removed.



Sometimes there may not be enough information in a menu for you to understand how a command works. Then you can press the HELP key.

### **OFFIX Help Screens**

Help is available at any time just by pressing the HELP key. **OFFIX** always knows what you're doing and gives you help based on that. **OFFIX** help usually includes a few paragraphs that explain what is happening and what you need to do, plus a complete and detailed explanation of all the menu choices available at the time.

Just like tutorials, help can consist of one or more screens. If there is more than one screen, you always have a choice of seeing the next screen or skipping the rest.

### **OFFIX Information Folder**

**OFFIX** comes with a folder (an **OFFIX** folder, not a real one!) containing supplementary information. The folder contains a series of documents that explain some aspects of **OFFIX** that are not needed all the time. You can take out and open this folder to find out what is available. For example, there is a document that explains how to choose colors on your color monitor display.

### **OFFIX Error Messages**

Whenever you make a mistake or whenever **OFFIX** experiences any abnormal activity (e.g., errors reading a floppy disk), an error message tells you in a few sentences what happened and what you should do. If the error message is not sufficient, you can always press the HELP key and **OFFIX** will give you a more detailed explanation of the error.

### **OFFIX Customer Support**

It is very unlikely that you'll ever need technical assistance with **OFFIX**. In case you do, support is available from your authorized **OFFIX** dealer. Authorized dealers can use a toll-free technical support hot-line to get help directly from the technical staff at Emerging Technology.

Every registered **OFFIX** owner will receive the quarterly publication **OFFIX News**. **OFFIX News** will give you tips on how to use **OFFIX** effectively, and it will tell you about product updates and **OFFIX** add-on products. Once you become an **OFFIX** owner, we never forget you.



**OFFIX Specifications**

**FILE CABINETS**

<b>Cabinets:</b>	2
<b>Drawers per cabinet:</b>	3
<b>Folders per drawer:</b>	100
<b>Documents per folder:</b>	unlimited
<b>Filled forms ("records") per folder:</b>	variable (limited by maximum folder size)
<b>Max. folder size:</b>	1,000,000 characters (on hard disk) or capacity of diskette
<b>Max. document size:</b>	30,000 to 200,000 characters, depending on memory available
<b>Max. filled form size:</b>	2000 characters
<b>Actions on drawer:</b>	select, open, close, relabel
<b>Actions on folder:</b>	create, select, take out of drawer, put back in drawer, open, close, destroy
<b>Actions on filled form or document:</b>	create, select, review, modify, copy to another folder, destroy
<b>Storage order:</b>	alphabetically within folder by first field of form or by document name

**FORM DESIGN**

<b>Max. entries ("fields") per form:</b>	50
<b>Max. columns per form:</b>	80
<b>Max. rows per form:</b>	22
<b>Max. label ("field name") size:</b>	unlimited (last 6 non-blank characters must be unique)
<b>Max. entry ("field value") size:</b>	250 characters (24 for first entry)

SPECIFICATIONS SUBJECT TO CHANGE WITHOUT NOTICE



Alterations to existing blank forms:                      move entry, add entry, delete entry

#### FORM ENTRY

Editing:                                      delete character, erase entry, erase all entries

Cursor movements:                          next/previous entry, first entry, next/previous character, start/end of entry

Scrolling:                                    left and right within entry

#### FORM SEARCHING

Search conditions:                          exact match, partial match, numeric comparison, numeric range, negation

Partial matches:                           beginning of entry, end of entry, middle of entry, arbitrary character

Numeric comparison:                        less than, equal to, greater than

Specification method:                       search criteria entered into blank form; previous specification may be recalled

Max. search conditions:                    10

#### REPORT GENERATION

Report style:                                columnar, with optional totals; pages are numbered, dated and titled

User controls:                               search criteria (same as for FORM SEARCHING), column titles, column widths, sort order, integer or dollar totalling, page layout

Specification method:                       user controls entered into blank form; previous specification may be recalled

Output:                                       printer or screen

Max. search conditions:                    10

Max. width:                                   10 columns; 132 characters

SPECIFICATIONS SUBJECT TO CHANGE WITHOUT NOTICE



**Page layout controls:** page title, top/bottom/left margin, page length/width

**Output device selection:** screen, printer, disk file

### WORD PROCESSING

**Editing:** delete character/line/block, transfer/copy block, document merge

**Typing modes:** insert, overwrite

**Cursor movements:** next/previous line, next/previous character, next/previous page, start/end of line/document

**Scrolling:** left, right, up, down

**Text width:** adjustable from 10 to 120 characters, with automatic word-wrap during text entry and user-controlled paragraph reformatting

**Margin adjustments:** top (0 to 9 lines), bottom (0 to 9 lines), left (0 to 20 characters)

**Page length adjustment:** 1 to 999 lines

**Line spacing adjustment:** single, double, triple

**Other options:** page numbering, page title, paper-insertion pause

**Character enhancements:** bold, underlined

**Output device selection:** screen, printer, disk file

### FORM LETTERS

**Method:** form labels inserted in document, surrounded with curly braces (e.g., {NAME}); one document printed for each form that matches user-specified search criteria

**Max. insertions per document:** unlimited

**Printing:** same features as for WORD PROCESSING



**Search conditions:** same features as for REPORT GENERATION

**Output device selection:** screen, printer, disk file

#### **ON-LINE INSTRUCTIONS**

**Instructional methods:** pop-up menus; multi-page tutorial screens for first-time users (may be suppressed); multi-page help screens; interactive, split-screen word processing tutorial; multi-line error messages with help available; status messages

**Size of instructions:** over 110,000 characters on-line

#### **HARDWARE & SOFTWARE REQUIREMENTS**

**Computer:** IBM PC (including XT, Compaq, Hyperion, Columbia), TI PC, Victor 9000, Zenith Z-100, DEC Rainbow 100, NEC APC, HP 150, Tandy TRS-80 Model 2000 (availability dates vary)

**Min. internal memory:** 192K

**Min. number of disk drives:** 2

**Min. capacity per drive:** 320K

**Hard disk:** supported for both program and data

**Display:** any monochrome or color display (80 columns required)

**Printer:** any parallel or serial printer

**Operating system:** PC-DOS or MS-DOS, Release 1 or 2

**SPECIFICATIONS SUBJECT TO CHANGE WITHOUT NOTICE**